IDC MarketScape

IDC MarketScape: Gulf Countries Colocation Services 2025 Vendor Assessment

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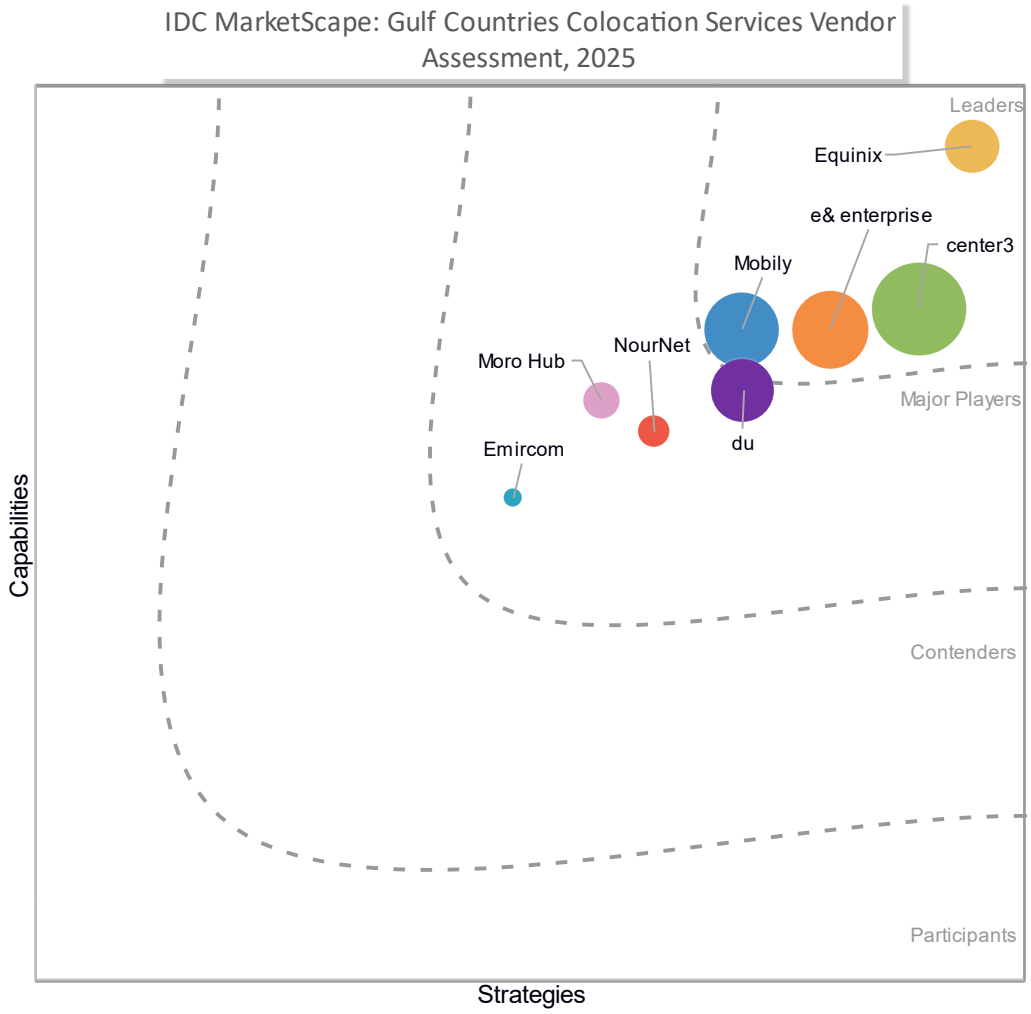
IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Gulf Countries Colocation Services 2025 Vendor Assessment



Note: Please see the Appendix for detailed methodology, market definition, and scoring criteria.

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IDC OPINION

Datacenters form the backbone of the digital economy, providing the critical infrastructure that supports cloud computing, Big Data analytics, and digital and AI services. As organizations shift focus toward their core business activities, third-party datacenters are emerging as the preferred choice over in-house facilities. These providers bring together innovation, robust security, and expansive connectivity ecosystems under one roof, enabling businesses to leverage advanced capabilities without the complexities of managing their own infrastructures.

The appeal of third-party datacenters lies in their ability to create a cohesive, interconnected environment that seamlessly integrates with major cloud platforms and communication networks. This interconnectedness simplifies hybrid cloud and multicloud strategies, facilitating greater operational flexibility and efficiency. At the same time, these providers maintain rigorous security measures and compliance standards, ensuring a resilient and secure environment that aligns with diverse industry requirements.

Sustainability is another key differentiator. Leveraging their scale, third-party providers can invest in energy efficiency and renewable energy sources, making them well suited to meet evolving sustainability goals. Their ability to implement such measures on a large scale helps drive down the environmental impact of datacenter operations, a challenge that many enterprises struggle to address independently.

Overall, third-party datacenters are not merely facilities for hosting IT assets but strategic partners in digital transformation. By offering a combination of innovation, connectivity, security, and sustainability, they enable businesses to remain agile and competitive in a rapidly evolving digital landscape.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

To gain insights into the competitive landscape of prominent datacenter SPs in the Gulf Cooperation Council (GCC) region, IDC assessed their capabilities to cater to organizations' requirements across various sizes and levels of prominence. To achieve this, IDC established vendor inclusion criteria to define the parameters of the study. All vendors had to meet four specific criteria to be eligible for participation in this IDC MarketScape. They must:

- Actively promote and provide retail and/or wholesale colocation services in the Gulf Region (Saudi Arabia, United Arab Emirates, Qatar, Bahrain, Oman, and Kuwait)
- Operate and provide services from a minimum of two commercial datacenters within at least one Gulf country

- Have a combined minimum IT load of 2MW datacenter capacity under operation across the GCC
- Generate over $5 million in annualized revenue through datacenter colocation services offering

ADVICE FOR TECHNOLOGY BUYERS

Datacenters play a crucial role in empowering businesses to fully leverage digital transformation and stay competitive in a rapidly evolving technological landscape. As companies integrate hybrid infrastructure, AI, and advanced analytics into their operations, choosing the right datacenter provider has become a strategic decision that goes far beyond physical infrastructure. Key considerations include location, security, and uptime to ensure uninterrupted operations, while compliance and certifications serve as essential markers of reliability and trust. Additionally, as organizations scale and adopt new technologies, factors such as sustainability, interconnection ecosystems, and AI readiness are gaining prominence in decision-making. Evaluating these aspects comprehensively helps businesses find a provider that addresses their current needs and enables long-term growth and innovation.

When evaluating a datacenter provider, it is essential to consider the facility's location and proximity. A strategically placed datacenter can reduce latency, enhance accessibility, and support disaster recovery strategies. Businesses should assess the distance between the datacenters and their primary operations or customers to ensure optimal performance. Additionally, evaluating the regional risks — such as susceptibility to natural disasters or political instability — can help businesses identify whether the location aligns with business continuity and risk management needs.

Security measures, both physical and digital, are also vital considerations in datacenter selection. Buyers should look for facilities with multilayered physical security, including perimeter fencing, biometric access controls, and 24 x 7 onsite security personnel. On the digital front, it is crucial to assess the provider's cybersecurity measures, such as DDoS protection, firewalls, and encryption standards, to safeguard sensitive data and maintain compliance with industry regulations. These measures ensure that providers can protect critical business information and maintain a secure environment for hosted applications and data.

Reliability and uptime are also fundamental factors to examine. Providers should have a track record of high uptime percentages and robust redundancy measures, such as uninterruptible power supplies (UPS), backup generators, and diverse network paths to prevent service disruptions. Furthermore, certifications such as ISO 27001, SOC 2, and PCI DSS are essential as these indicate adherence to stringent operational standards and data security protocols. Compliance with these certifications provides additional assurance that providers can maintain a reliable and secure environment for business-critical operations.

Beyond operational metrics, buyers should consider the scalability options, sustainability initiatives, and interconnection ecosystems offered by providers. Understanding the facility's ability to support future growth and the adoption of emerging technologies, such as AI and high-performance computing, will be key to making an informed decision. Evaluating datacenters' energy efficiency, use of renewable energy, and commitment to reducing environmental impact also aligns with corporate sustainability goals. Additionally, choosing a provider with a robust interconnection ecosystem can enable seamless connectivity to various cloud providers and network services, enhancing operational flexibility and performance. Transparency in service delivery and visibility into key operational metrics also contribute to a positive service experience, making it easier to build a strong and reliable partnership with the provider.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each criterion outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

center3

Center3 is positioned in the Leaders category in this 2025 IDC MarketScape for Gulf countries colocation services.

Saudi Arabia's largest datacenter provider center3 was formed in 2022 following the spin-off of stc's physical infrastructure assets, which included datacenters, international submarine cables, and international points of presence. Initially branded as MENAHub, it was later renamed center3 to be marketed as a carrier-neutral hub that provides comprehensive hosting and connectivity solutions. The company's services are designed to support connectivity and hosting requirements as well as connect three continents — Asia, Europe, and Africa — offering a seamless link between these regions and the rest of the world.

The company's operations leverage existing datacenter assets and infrastructure investments inherited from STC, and center3 is planning massive expansion locally and regionally. It currently operates or is constructing more than 25 datacenters across various provinces in Saudi Arabia, as well as additional facilities in neighboring countries such as Bahrain and Kuwait. The company aims to expand its total capacity to 300MW through continued investment and strategic construction projects. The datacenters are built to meet Uptime Institute Tier III certification standards, ensuring high levels of availability and reliability, and are further supported by key industry certifications such as ISO 27001, ISO 9001, ISO 14001, and PCI DSS.

Several core offerings such as wholesale colocation, whitespace solutions, cross-connect services, and bespoke datacenter designs, are included in center3's service portfolio. The company also provides a range of managed services, including 24 x 7 onsite support (hands & eyes), out-of-band connectivity for remote infrastructure management, and tailored solutions for enterprises seeking to deploy custom datacenter setups. This comprehensive service catalog enables center3 to cater to hyperscalers, telecommunications providers, and enterprises with complex hosting and connectivity needs.

A key differentiator for center3 is its integrated approach to datacenter and connectivity services. By combining its hosting solutions with international and regional connectivity options — including IP transit, terrestrial and subsea capacity, and internet exchanges — center3 offers a one-stop shop for businesses and carriers looking to optimize their digital presence in the Middle East. This strategy also supports the company's objective of becoming a digital hub for the region, facilitating content delivery and connectivity for clients across the telecommunications, cloud services, and media sectors.

To unify its datacenter and connectivity assets into a cohesive platform, center3 is also developing a regional digital fabric. This initiative, combined with efforts to increase its network of internet exchanges and subsea cable systems, will enable the company to provide robust interconnection capabilities, reduce latency, and enhance the delivery of cloud and content services.

Strengths

center3's strengths lie in its robust infrastructure, strategic positioning, and commitment to innovation. By leveraging its geographic location, advanced technologies, and partnerships, center3 has established itself as a critical digital hub in the Middle East and beyond.

Its key differentiators include:

- **Strategic geographic positioning and connectivity.** center3's presence in Saudi Arabia, combined with its expanding footprint across the Middle East and neighboring regions, enables it to serve as a key digital hub that connects Asia, Europe, and Africa. The company's investment in international submarine cables, landing stations, and internet exchanges establishes it as a central player in providing low-latency, high-capacity connectivity across multiple continents.
- **Carrier-neutral hub ecosystem.** center3's carrier-neutral hub positioning attracts a wide range of international service providers, cloud providers, and content delivery networks, enabling diverse interconnectivity options. The company's strategy of combining hosting services with regional and international connectivity solutions supports clients seeking end-to-end solutions for their digital infrastructure needs.

- **Ongoing investments in datacenter fabrics.** The company is strategically investing in datacenter fabric technologies to strengthen connectivity across its local and regional datacenters. These fabrics will enable seamless integration, providing customers with direct and efficient access to center3's expanding partner ecosystem. By reducing operational complexity, these technologies will facilitate the easier adoption of hybrid cloud and multicloud solutions, streamlining cloud access while minimizing administrative overhead.

Challenges

By catering to service providers and enterprises, center3 navigates the challenge of articulating a unified value proposition that resonates with its diverse customer base. The integration of multiple datacenters, connectivity, and managed services adds complexity to its go-to-market (GTM) strategy, which may present opportunities for refinement in delivering a more cohesive and seamless customer experience. A clear focus on aligning these offerings will be key to maximizing customer satisfaction and operational efficiency.

Consider center3 When

Consider center3 when looking for a datacenter service provider with a strong presence in Saudi Arabia and the wider Middle East region that offers both comprehensive hosting and integrated connectivity solutions. The company's robust infrastructure, carrier-neutral positioning, and extensive network of international submarine cables make it a suitable partner for hyperscalers, telecommunications providers, and enterprises seeking reliable, high-availability datacenter services.

du

du is positioned in the Major Players category in this 2025 IDC MarketScape for Gulf countries colocation services.

Emirates Integrated Telecommunications Company (EITC), operating as du, is a telecommunications provider in the UAE. Since its establishment in 2006, du has expanded its offerings beyond traditional telecom services, incorporating advanced IT and network solutions to support the UAE's digital economy.

du currently operates five Uptime Tier III datacenters located in Abu Dhabi and Dubai. These facilities are designed to support critical business applications with high availability and reliability. Positioned in low-risk environments, the datacenters incorporate physical security measures to ensure operational continuity. They also provide carrier-neutral services, offering dual access to local networks and extensive international connectivity through terrestrial and subsea cable systems.

du's colocation services provide secure hosting options, including secure cabinets, private cages, and dedicated suites that all adhere to industry standards. These configurations are designed to meet the needs of diverse operational requirements,

including high-density AI workloads, by offering power and cooling setups that can support compute-intensive environments. The carrier-neutral design of du's datacenters enables businesses to optimize network performance and build redundancy through cross-connect services with multiple carriers and service providers, ensuring flexibility in connectivity.

To support operational continuity, du offers Remote Hands services, which provide onsite technical assistance for tasks such as hardware installation, maintenance, cable management, and server reboots. These services extend to managing the complexities of infrastructure, such as assisting with installations and high-performance server configurations, reducing the need for businesses to deploy their own staff to datacenters.

In addition to colocation, du provides managed services to support IT environments, covering servers, storage, and network components. These services help businesses maintain infrastructure performance while minimizing downtime. By managing day-to-day IT operations, du enables organizations to focus resources on other priorities. du also offers cloud services designed for flexible, on-demand scalability. These solutions are secured with robust protocols, enabling businesses to adapt their IT resources to evolving requirements. For business continuity, du provides disaster recovery services, including advanced backup options and recovery planning, ensuring minimal disruption during unexpected events.

Strengths

du has established itself as a prominent datacenter provider in the UAE, leveraging strategic partnerships and geographic advantages to deliver high-quality interconnectivity and colocation solutions.

Its key differentiators include:

- **Ecosystem partnership and interconnectivity options.** du offers extensive interconnectivity options through its robust ecosystem of partnerships. These include collaborations with Equinix, major cloud providers, telecommunications networks, and content delivery platforms, enabling customers to access a diverse and interconnected digital infrastructure tailored to modern business needs.
- **Strategic locations across the UAE.** With datacenters strategically located across the UAE, du ensures proximity to key UAE cities. This geographic positioning supports low-latency connectivity, regulatory compliance, and scalable solutions for organizations operating within the region.
- **Comprehensive managed services portfolio.** du complements its colocation and interconnectivity offerings with a range of managed services, including cloud management, disaster recovery, and cybersecurity solutions, enabling customers to streamline IT operations through a single provider.

Challenges

du operates in a highly competitive market, where distinguishing service offerings remains a challenge. Its reliance on traditional service delivery models may also limit the level of automation and visibility on its datacenter services delivery available to customers. This presents opportunities for further innovation that meets evolving expectations for real-time insights and enhanced operational transparency.

Consider du When

Consider du if your business requires a provider with strategic datacenter locations across the UAE and that offers low-latency connectivity and proximity to key UAE cities. du's robust ecosystem of partnerships with cloud providers, carriers, and content delivery networks ensures seamless interconnectivity, while its integration with its telecommunications infrastructure provides unified IT and network solutions. Additionally, du's services are well suited for organizations that prioritize compliance with UAE regulatory requirements and seeking scalable, flexible infrastructure to support growth and evolving business demands.

e& enterprise

e& enterprise is positioned in the Leaders category in this 2025 IDC MarketScape for Gulf countries colocation services.

e& enterprise, a division of the e& (formerly Etisalat Group), is a well-established provider of digital transformation and technology solutions across the Middle East and North Africa (MENA) region. The company offers a comprehensive suite of services, including cloud solutions, cybersecurity, IoT, customer experience (CX), and AI, targeting businesses across diverse industries. With more than 22 years of experience in managing and operating datacenters, e& enterprise has established a robust network of 11 state-of-the-art datacenters across three major cities in the UAE (Abu Dhabi, Dubai, and Al Ain), providing critical digital infrastructure and connectivity solutions. The company's datacenter portfolio is designed to meet international standards and certifications, making it a reliable partner for both local and global enterprises.

e& enterprise operates a network of Uptime Tier III datacenters, including flagship facilities at Ibn Battuta, Khalifa City, and Jebel Ali, offering a combined operational capacity exceeding 30MW. These datacenters offer colocation, managed hosting, cloud interconnection, and network services, with a focus on high availability, security, and scalability. The facilities are equipped with redundant power and cooling systems, ensuring 99.982% uptime. Security measures include advanced physical and digital controls, such as biometric access, 24 x 7 surveillance, and comprehensive DDoS protection as a value-add. The company's datacenters are also certified for ISO 27001, ISO 22301, PCI DSS, and LEED standards, further demonstrating its commitment to security and sustainability.

e& enterprise datacenters are hubs for cloud and network interconnection, offering cross-connectivity, direct peering with regional ISPs, and low-latency connections. The company provides flexible colocation options, ranging from single-server hosting to full cabinets and dedicated cages, catering to a diverse range of client requirements. Additionally, e& enterprise offers value-added services such as smart hands support, remote monitoring, and professional services, ensuring comprehensive support for clients' IT and operational needs.

Aligned with the UAE's sustainability goals, e& enterprise integrates energy-efficient technologies and green building practices across its datacenters. The company holds several certifications, including LEED, ISO 14001 for environmental management, and OHSAS 18001 for occupational health and safety. These initiatives contribute to reducing the overall carbon footprint of its datacenter operations.

The company has forged strategic partnerships with global technology providers such as Microsoft, AWS, VMWare, Nutanix, and IBM, enabling seamless hybrid cloud deployments and multicloud connectivity solutions. In addition, its security operations center (SOC) provides managed security services, adhering to local regulations and enhancing clients' cybersecurity postures. The company is also poised to leverage opportunities in the expanding Saudi Arabia market as well as nearby markets, which could further strengthen its presence and service offerings across the region.

Strengths

e& enterprise's strengths include its strategic datacenter presence, robust connectivity solutions, and strong alliances with global technology providers. The company's infrastructure and service offerings are designed to support a broad range of business needs across the UAE, enabling enterprises to access scalable and secure digital solutions.

Its key differentiators include:

- **Strategic datacenter footprint and colocation capabilities.** e& enterprise operates an extensive network of datacenters strategically located across key cities in the UAE. With multiple colocation facilities in each location, the company ensures reliable, high-availability options for businesses seeking to establish a strong digital presence in the region. This broad coverage, combined with its advanced infrastructure, positions e& enterprise as a robust provider capable of meeting the diverse colocation needs of enterprises.
- **Advanced network connectivity and cross-connectivity solutions.** e& enterprise offers comprehensive network connectivity and cross-connectivity options, providing seamless integration between its datacenters and customer infrastructures. This capability supports a wide range of digital services, including direct access to cloud providers, scalable bandwidth, and

secure intersite communications. These features enable businesses to create a unified, efficient digital environment that supports operational efficiency and flexibility.

- **Diverse service portfolio and strategic alliances with global technology leaders.** e& enterprise's service offerings go beyond traditional colocation to include managed hosting, private cloud solutions, and advanced cybersecurity services. By partnering with global technology giants such as Microsoft, AWS, VMware, Nutanix, and IBM, e& enterprise enhances its ability to deliver comprehensive and cutting-edge digital solutions. These partnerships ensure that customers can leverage best-in-class technologies to support their evolving business needs, from cloud migration to secure data management and digital transformation initiatives.

Challenges

e& enterprise is slow in modernizing its service delivery, as traditional processes and limited automation can result in less-efficient provisioning, support, and reporting. Furthermore, few of its service delivery partnerships are primarily tactical, which may complicate collaboration and lead to extended timelines for service delivery, impacting overall agility and responsiveness in a competitive market.

Consider e& enterprise When

Consider e& enterprise if you are seeking a colocation provider with extensive datacenter facilities across the UAE with strong track record in service delivery, combined with integrated solutions for interconnectivity, MPLS, and cloud on-ramp. The company's digital infrastructure offerings provide a blend of colocation services and network solutions, making it a one-stop shop for businesses looking to optimize their IT environment while ensuring low-latency access to cloud and network services.

Emircom

Emircom is positioned in the Major Player category in this 2025 IDC MarketScape for Gulf countries colocation services.

Founded in 1984 and headquartered in Abu Dhabi, Emircom is a system integrator and IT solutions provider with a presence in the UAE and Saudi Arabia. The company serves private and public sector clients, offering a range of IT and infrastructure solutions designed to meet the specific needs of organizations in the region. Emircom's partnerships with global technology vendors enable it to deliver integrated solutions aligned with industry standards.

Emircom's datacenter services focus on fit-for-purpose wholesale colocation, primarily targeting large enterprises and service providers. The company specializes in long-term colocation contracts, offering scalable infrastructure that supports clients' operational requirements. Emircom also addresses demand for AI-ready

datacenters, providing purpose-built facilities that accommodate the specialized computing and storage needs of AI workloads.

A key capability within Emircom's datacenter services is its in-house manufacturing of prefabricated modular datacenters through its subsidiary, DCV Industries. These modular datacenters are available across the MENA region, providing a flexible and scalable solution for organizations seeking rapid deployment and cost-effective infrastructure. This approach enables Emircom to offer clients a more adaptable alternative to traditional datacenter builds, addressing diverse requirements across various industries.

The company's partnerships with technology providers such as Cisco, Dell Technologies, and VMware support its delivery of integrated datacenter services, covering design, deployment, and ongoing management. This collaboration ensures that Emircom can provide solutions that meet the specific needs of large customers, particularly in wholesale colocation and modular datacenter services.

Emircom also incorporates sustainability measures into its datacenter design and operations. The company uses energy-efficient designs and resource management practices aimed at reducing the environmental impact of its facilities. This focus on energy efficiency supports Emircom's internal sustainability goals and those of its clients, aligning with broader efforts to reduce carbon footprints across IT operations in the region.

Strengths

Emircom's strengths lie in its ability to deliver tailored datacenter solutions that address the specific needs of large enterprises and service providers in the MENA region.

Its key differentiators include:

- **Fit-for-purpose colocation services.** Emircom specializes in wholesale colocation services designed to meet the specific needs of large enterprises and service providers. By focusing on long-term colocation contracts, it ensures that clients have access to scalable and reliable infrastructure to support their expanding operations. The company also provides purpose-built datacenters that are equipped to handle the intensive computing and storage requirements of AI workloads, addressing the growing demand for AI-capable infrastructures.
- **In-house modular datacenter manufacturing.** Through its subsidiary, DCV Industries, Emircom has in-house capabilities to design and manufacture prefabricated modular datacenters. These modular solutions offer flexibility, rapid deployment, and cost-efficiency, catering to diverse industry needs across the MENA region.

- **Strong technology partnerships.** Emircom's strategic alliances with key global technology providers, including Cisco, Dell Technologies, and VMware, enable the company to integrate cutting-edge technology solutions into its offerings. This ensures customers benefit from industry-standard innovations in their datacenter operations.

Challenges

A key challenge for Emircom is its strong focus on serving large customers, such as service providers and enterprises with significant infrastructure needs. While this focus enables the company to offer specialized, high-capacity solutions, it leaves a gap in addressing the requirements of small and midsize enterprises. Customers in this segment may find Emircom's services less aligned with their needs, as the company currently prioritizes long-term, large-scale colocation contracts and has limited offerings tailored to the smaller-scale demands of midmarket or enterprise-level businesses.

Consider Emircom When

Emircom could be the right fit for a company whose demands for a data-driven future requires infrastructure that is purpose-built, scalable, and capable of supporting complex, high-density workloads. Emircom's services are ideal for customers seeking single-tenant datacenter colocation solutions, which helps them avoid the challenges of designing, building, and managing the facility over its life cycle.

Equinix

Equinix is positioned in the Leaders category in this 2025 IDC MarketScape for Gulf countries colocation services.

Equinix is a well-established global datacenter and interconnection service provider with a significant presence in the Middle East, including key facilities in the United Arab Emirates and Oman. Its operations in the UAE encompass its datacenters in Dubai (DX1, DX2, and the recently launched DX3) and Abu Dhabi (AD1), while its IBX datacenter MC1 in Muscat and Salalah SN1 in Oman serve as crucial hubs that connect the Middle East to Asia, Europe, and beyond. Leveraging its global platform, Equinix provides scalable colocation, interconnection, and hybrid cloud solutions, enabling businesses to connect with a vast ecosystem of carriers, cloud service providers, and IT solutions. This broad presence positions Equinix as a preferred partner for enterprises seeking to expand their digital infrastructure and optimize network performance across globally and regionally.

Equinix's UAE and Oman facilities are designed to meet the highest industry standards, offering redundant power, advanced cooling systems, and multilayered security measures to ensure high availability and reliability. The new DX3 Datacenter in Dubai is built to accommodate growing demand, featuring enhanced capacity and

connectivity options for enterprises looking to establish their presence in the region. Similarly, the Abu Dhabi (AD1) facility is positioned to support the capital's evolving digital ecosystem, providing direct access to critical network exchanges and interconnection services. These datacenters, alongside the Muscat (MC1) and Salalah (SN1) facilities, offer direct, low-latency connections to local and global cloud providers, internet exchanges, and other Equinix datacenters worldwide.

Equinix's service portfolio in the UAE and Oman goes beyond traditional colocation, focusing on enabling digital transformation through interconnection and cloud integration solutions. Equinix Fabric enables businesses to create on-demand and secure connections to major cloud providers such as AWS, Microsoft Azure, Oracle Cloud, and Google Cloud, supporting hybrid cloud and multicloud architectures. These capabilities, combined with Equinix's managed network services and extensive interconnection options, provide enterprises with the flexibility to optimize their IT and cloud strategies while maintaining high performance and security.

Sustainability is a core element of Equinix's operational strategy. The company is committed to achieving its global sustainability goals by optimizing energy usage and integrating renewable energy sources wherever possible. Equinix's UAE and Oman datacenters utilize energy-efficient technologies and advanced cooling methods to reduce their carbon footprint, supporting the region's broader sustainability initiatives and environmental goals.

Strengths

Equinix leverages its global infrastructure and expertise alongside its expanding presence in the Gulf Region to deliver robust digital solutions for businesses operating locally and internationally. The company's strengths lie in its ability to combine a worldwide network of datacenters with regional facilities, offering seamless connectivity and interconnection options that meet the diverse needs of Gulf-based enterprises looking to scale globally and vice versa.

Below are the key strengths that differentiate Equinix:

- **Global and regional datacenters footprint.** Equinix operates over 260 datacenters worldwide, including strategic locations in the Gulf Region such as Dubai, Abu Dhabi, and Muscat. This integrated global and regional footprint provides businesses with low-latency access to key markets and enables them to deploy IT infrastructure closer to both regional and international customers, supporting scalability and enhancing service delivery.
- **Seamless interconnection across global and local networks.** Equinix offers extensive interconnection services, enabling businesses to connect seamlessly to other businesses within the Gulf Region and to major business hubs worldwide. Through its dense ecosystem of network providers, cloud services, and internet exchanges, Equinix enables secure, high-performance connections that support regional and cross-border data exchange, catering

to the connectivity needs of enterprises operating across multiple geographies.

- **Comprehensive service portfolio backed by strategic partnerships.** Equinix provides a range of digital services, including hybrid cloud solutions, edge computing, and secure data management, supported by partnerships with leading global cloud providers such as AWS, Microsoft Azure, Google Cloud, and Oracle. This combination of global and regional capabilities helps businesses in the Gulf Region integrate their digital infrastructures with global platforms, ensuring they have the flexibility, scalability, and reliability needed to compete in local and international markets.

Challenges

Equinix faces several challenges as it seeks to maintain its global leadership position within the Gulf Region. For many regional customers, the company's extensive global footprint, highly automated service delivery model, and dynamic interconnectivity offerings may not align with localized preferences or requirements. As a result, Equinix's value proposition may appear to be less compelling. Furthermore, the Gulf's datacenter market is largely dominated by telecom-backed providers, which have been aggressively investing in expanding their facilities, service delivery, and operational capabilities. These local providers have the advantage of established customer relationships through their telecommunications services, which they can leverage to bundle datacenter solutions and offer more integrated service packages. This ability to cross-sell and bundle services gives regional players a competitive edge in capturing market share and meeting the unique needs of Gulf-based enterprises.

Consider Equinix When

Organizations seeking a globally recognized datacenter provider with extensive geographic coverage and robust interconnection capabilities should consider Equinix. The company is ideal for businesses looking to expand their digital presence across multiple markets or those in need of seamless, low-latency connectivity between regions. Equinix's diverse ecosystem of partners, cloud providers, and network operators makes it a strong choice for enterprises pursuing hybrid and multicloud strategies. Additionally, Equinix's focus on automation and standardized service delivery is well suited for companies that prioritize operational efficiency and scalability in their datacenter's infrastructure.

Mobily

Mobily is positioned in the Leaders category in this 2025 IDC MarketScape for Gulf countries colocation services.

Etihad Etisalat Company, commonly known as Mobily, was established in 2004 as Saudi Arabia's second mobile network operator. In 2012, the company expanded its scope to include datacenter, cloud, and infrastructure services, aligning with the

region's growing demand for digital transformation capabilities. Mobily's datacenters adhere to Uptime Institute certifications and international compliance standards such as ISO 27001 and PCI DSS, ensuring secure and reliable operations for its customers.

Mobily provides services to a varied client base, including cloud providers, government entities, financial institutions, and enterprises. These services address the needs of organizations that require high levels of data security and operational consistency. The company emphasizes compliance and performance standards, positioning itself as a provider of essential IT infrastructure.

Mobily operates a network of 10 datacenters across Saudi Arabia, with all these facilities offering colocation services. These datacenters are in key cities such as Riyadh, Jeddah, Dammam, and Unaizah to provide broad coverage for clients across different regions. Each facility is designed with redundant power, cooling systems, and advanced physical security measures to support uninterrupted operations. The company has announced plans to expand its commercial datacenter capacity by 10MW, reflecting its focus on addressing increasing demand for infrastructure. Mobily's datacenters are also part of a broader strategy that integrates interconnectivity, submarine cable systems, and terrestrial networks to support enhanced connectivity and data exchange.

Mobily's datacenter services are structured to support varied business requirements. It offers colocation services in both caged and uncaged formats, providing physically secure and environmentally controlled spaces for hosting IT infrastructure. Cross-connect solutions facilitate direct physical connections between cabinets and meet-me rooms within Mobily's facilities, enabling efficient data transfer with low latency. The company also offers enterprise connectivity services, such as direct internet access (DIA) and IP VPN, to provide network access tailored to organizational needs. Smart hand services are available for onsite technical support, ensuring that infrastructure hosted within the datacenters can be managed effectively. These services are part of Mobily's efforts to provide consistent and operationally sound infrastructure solutions for businesses operating in the region.

Strengths

Mobily, as one of the earliest datacenter providers in Saudi Arabia, has established a strong reputation as a reliable colocation provider. By leveraging its extensive telecommunications expertise and a strategically distributed network of facilities, Mobily meets the diverse needs of enterprises across the country. Its key strengths include:

- **Extensive regional footprint.** Mobily operates a strategically distributed network of datacenters across Saudi Arabia, enabling enterprises to choose locations that align with their geographic and operational requirements. This

footprint supports businesses in achieving optimal proximity to their customers and compliance with local data sovereignty regulations.

- **Integrated solutions portfolio.** Mobily offers seamless integration of its datacenter services with its robust telecommunications infrastructure and cloud solutions. This enables businesses to benefit from end-to-end services that simplify operations, reduce complexity, and enhance performance through a unified ecosystem.
- **Strong strategic partnerships.** Mobily collaborates with major global technology providers, ensuring access to their solutions and expertise. These partnerships enable Mobily to enhance its service portfolio with advanced technologies such as AI-driven automation, cybersecurity enhancements, and innovative cloud capabilities.

Challenges

Mobily faces growing competition in Saudi Arabia's datacenter market from global and regional players making significant investments in large-scale facilities to meet the rising demand for cloud and datacenter services. Many of Mobily's current facilities may lack the capacity to support hyperscale and AI-driven workloads, which limits its ability to attract high-value customers. Additionally, scaling its sustainability initiatives to align with global best practices presents a challenge, as businesses increasingly prioritize green and energy-efficient datacenter solutions.

Consider Mobily When

Mobily's datacenter services are an ideal fit for enterprises and government organizations in Saudi Arabia that require high-reliability hosting, localized expertise, and seamless connectivity solutions. Consider Mobily when prioritizing compliance with regional regulations, low-latency connectivity, and integration with existing telecommunications services.

Moro Hub

Moro Hub is positioned in the Major Players category in this 2025 IDC MarketScape for Gulf countries colocation services.

Moro Hub was founded in 2018 by the Dubai Electricity and Water Authority (DEWA) as part of Dubai's 10X initiative, aimed at advancing the city's digital and sustainability objectives. The hub supports DEWA's focus on integrating digital infrastructure with environmental considerations, particularly in the context of energy usage. It plays a role in Dubai's broader efforts to implement digital solutions while addressing sustainability challenges, particularly through its involvement in green energy initiatives. Moro Hub operates within this framework to facilitate the city's strategic goals for technological advancement and environmental responsibility.

Moro Hub's datacenter services primarily focus on retail colocation. It provides caged and non-caged colocation options for its retail customers. The caged colocation service offers a dedicated, secure enclosure for housing critical IT equipment, accessible only to authorized personnel. Clients can customize their setups and benefit from reliable power, connectivity, and round-the-clock monitoring. The non-caged colocation service allows for a more flexible approach, enabling customers to host equipment in a shared environment. Currently, wholesale colocation constitutes a smaller portion of Moro Hub's customer base and datacenter capacity. However, the company plans to significantly expand its wholesale colocation revenue over the next two to three years, aiming for an equal revenue split between retail and wholesale colocation services.

Aside from its core datacenter colocation services, Moro Hub provides various adjacent services, including remote hands support, managed bare-metal offerings, hosted private cloud services, and other managed IT and security services. These services are generally tailored to meet the specific needs of individual customers. Moro Hub's connectivity offerings are focused on enabling services through partnerships with major providers, such as e& and du, as well as its sister company InfraX. In these partnerships, Moro Hub primarily takes a supporting role, while connectivity partners manage the end-to-end service delivery to customers.

A key aspect of Moro Hub's datacenter services is that its facilities are powered entirely by renewable energy. Its largest datacenter, located next to the Mohammed bin Rashid Al Maktoum Solar Park, directly sources its power from the adjacent solar farm. This facility holds a Guinness World Record for being the largest solar-powered datacenter. Moro Hub's other datacenters achieve carbon neutrality through a mix of renewable energy and carbon credits. The company also adopts sustainable construction methods, such as using prefabricated steel, and utilizes energy-efficient systems, including lithium ion batteries and AI-driven cooling, to further minimize environmental impact.

Strengths

Moro Hub's strengths are centered around its strong commitment to sustainability and its alignment with the UAE's vision for a greener, more energy-efficient digital future. By leveraging renewable energy sources and carbon-neutral operations, Moro Hub positions itself as a leading provider for organizations prioritizing environmental responsibility. The company's sustainability initiatives reduce the carbon footprint of its datacenter operations and offer clients a unique value proposition by integrating environmental benefits into their IT strategies.

Its key differentiators include:

- **Sustainable operations and renewable energy usage.** Moro Hub's datacenters are powered entirely by renewable energy, with the company focusing on maximizing energy efficiency and minimizing environmental

impact. Its flagship facility, which operates exclusively on solar power, has earned a Guinness World Record for being the largest solar-powered datacenter. This demonstrates Moro Hub's strength in sustainable technology infrastructure and solidifies its status as a pioneer in green datacenters solutions.

- **Recognition and incentives for green practices.** Moro Hub provides its clients with Green Certificates that quantify the carbon savings achieved by hosting their infrastructure at Moro's datacenters. This reinforces the sustainability narrative and enables customers to showcase their own environmental commitment, making it a strong choice for businesses that aim to align their IT operations with broader sustainability goals and compliance mandates.

Challenges

Moro Hub's market growth is constrained by a few key challenges. Its facilities are concentrated solely in Dubai, limiting its geographic reach and attractiveness to organizations seeking multicity redundancy across the UAE. Moro Hub's capabilities in interconnection services are also less developed, making it harder to compete in scenarios requiring advanced connectivity options. The company's limited automation in service delivery further impacts its ability to offer rapid scalability and operational efficiency, which could be a drawback for enterprises with complex deployment needs.

Consider Moro Hub When

Choose Moro Hub if sustainability and environmental stewardship are core to your datacenter strategy. With facilities powered entirely by renewable energy, Moro Hub offers a focused presence in Dubai, delivering colocation, cloud, managed services, and security solutions. The provider's integrated offerings are tailored for organizations seeking to align IT operations with sustainability goals, while leveraging comprehensive services that support digital transformation and enhance security posture.

NourNet

NourNet is positioned in the Major Players category in this 2025 IDC MarketScape for Gulf countries colocation services.

Established in 1998, NourNet has grown from being an internet service provider into a comprehensive information and communication technology (ICT) service provider. Headquartered in Riyadh, the company serves public and private sector clients across the kingdom, supported by over 450 employees. NourNet's diversified client base spans more than 1,200 businesses across 30 cities.

The company operates datacenters in Riyadh and Dammam, including a 4,500 sq m Uptime Tier III carrier-neutral facility in Riyadh. This flagship datacenter is designed

to accommodate up to 450 racks and supports businesses with infrastructure that prioritizes scalability, reliability, and security. Key features include redundant power supplies, advanced cooling systems, and rigorous security protocols to ensure uninterrupted operations. By leveraging its carrier-neutral status, NourNet enables clients to choose from a variety of connectivity providers, fostering flexibility and seamless collaboration.

NourNet's portfolio encompasses a wide range of ICT services, catering to critical areas such as managed services, cloud solutions, connectivity, and cybersecurity. Its managed services include server support, database management, storage and backup solutions, IT service management, and resource augmentation, ensuring that businesses can focus on their core operations while leaving technical complexities to experts. In the datacenter domain, NourNet provides hosting, colocation, and business continuity solutions, alongside remote hands support, enabling clients to maintain operational resilience. The company's cloud services extend across a fully Saudi-hosted cloud environment while also partnering with global providers such as Microsoft, Oracle, and AWS to deliver tailored hybrid cloud and multicloud solutions that align with evolving enterprise demands.

In addition to its core offerings, NourNet operates a carrier-neutral IP network, ensuring robust and uninterrupted connectivity for businesses — a critical enabler for today's digitally connected operations. The company also prioritizes cybersecurity, providing services such as endpoint security, email protection, web application firewalls, and SOC as a service. These solutions are designed to address the growing threat landscape while helping clients safeguard their digital assets and meet regulatory requirements.

From sustainability perspective, NourNet's datacenters incorporate energy-efficient cooling systems and infrastructure designed to optimize power usage, reflecting a commitment to reducing environmental impact. With its broad service offerings and focus on reliability, adaptability, and security.

Strengths

NourNet's strength lies in its ability to deliver end-to-end solutions for businesses' digital infrastructure needs, ranging from colocation services to fully managed ICT and security services. The company demonstrates a strong capability to support hybrid cloud and multicloud environments, leveraging strategic partnerships with global cloud providers such as Microsoft, Oracle, and AWS. This enables NourNet to provide flexible and scalable solutions tailored to meet evolving business requirements.

Its key differentiators include:

- **Carrier-neutral datacenters.** NourNet's datacenters, including its Uptime Tier III facility in Riyadh, offer clients the freedom to select their preferred

network providers. This approach enhances connectivity options and supports diverse business demands.

- **Comprehensive service portfolio.** NourNet offers a broad spectrum of ICT services, including managed IT solutions, cybersecurity, connectivity, and cloud services, ensuring businesses can rely on a single partner to address their digital transformation objectives effectively.
- **Strategic cloud partnerships.** By collaborating with well-established global cloud providers, NourNet expands its service capabilities, enabling organizations to adopt hybrid cloud and multicloud strategies that align with their operational and regulatory needs.

Challenges

NourNet's datacenter services, though robust and reliable, face challenges in meeting the demands of the modern digital infrastructure. The concentration of its large facilities in Riyadh limits regional redundancy, which is critical for enterprises with multiregional requirements. Additionally, the current infrastructure may not fully accommodate the specialized needs of emerging technologies such as AI, machine learning, and edge computing, which require higher capacity and rack densities. While the carrier-neutral model offers flexibility, the interconnection ecosystem may lack the diversity and scale of larger providers, potentially constraining options for businesses with complex multicloud architectures or real-time analytics requirements.

Consider NourNet When

Businesses operating within Saudi Arabia that prioritize local data residency, regulatory compliance, and local expertise will find NourNet well suited to their needs. It is particularly ideal for organizations seeking a comprehensive range of solutions, including colocation, managed ICT, cybersecurity, and hybrid cloud or multicloud integration. With carrier-neutral facilities and strong regional expertise, NourNet caters to enterprises with moderate scalability and centralized infrastructure requirements, offering flexibility and end-to-end support for their digital infrastructure needs.

VENDORS TO WATCH

In addition to the vendors evaluated in this IDC MarketScape, several others are developing notable capabilities in their datacenter services portfolios. These vendors have the potential to become strong contenders in the colocation services market in the near future.

Some vendors were not included in this IDC MarketScape due to factors such as being a relatively new entrant or service portfolios currently being in transition, affecting their readiness for evaluation.

For this IDC MarketScape, these vendors are highlighted as ones to watch:

- **MENA Digital Hub.** MENA Digital Hub (MDH), spun off from Ooredoo, operates as an independent entity specializing in datacenter colocation and digital infrastructure services, including the design, construction, and management of datacenters. With 26 facilities across Qatar, Kuwait, Oman, Iraq, and Tunisia, MDH aims to address the MENA region's growing demand for scalable digital infrastructure, with plans to expand its capacity to over 120MW in the coming years. MDH's carrier-neutral datacenter platforms support diverse workloads, ranging from general-purpose computing to advanced AI clusters. Leveraging strong government relationships, MDH ensures fast build-to-suit deployments. Partnerships with leading technology providers, including NVIDIA, also enable AI infrastructure offerings such as GPU as a service. Building on Ooredoo's regional connectivity infrastructure, MDH's datacenter platform delivers robust connectivity and optimized performance that meets the evolving needs of hyperscalers, AI workloads, enterprises, colocation providers, and governments. With its strategic locations, scalable infrastructure, and forward-looking vision, MENA Digital Hub is positioned to accelerate MENA's digital transformation and competitiveness while reinforcing its role as a leading digital infrastructure provider.
- **EDGNEX by DAMAC.** EDGNEX, the datacenter division of Dubai-based DAMAC Group, focuses on expanding its digital infrastructure footprint in the Gulf Region and beyond. The company is developing datacenters across the Gulf, with an initial focus on Saudi Arabia, targeting scalability, energy efficiency, and secure hosting for enterprises, governments, and hyperscalers. In Saudi Arabia, EDGNEX is constructing facilities in Riyadh and Dammam, with a combined planned IT capacity of 55MW, expected to be operational by 2025. EDGNEX is also pursuing international expansion, with projects under way in Southeast Asia (Thailand, Malaysia, and Indonesia), Europe (Greece), and the U.S. The company's plans in the U.S. include a $20 billion investment to develop datacenters with a projected capacity of 2,000MW over the next four years. This global expansion reflects EDGNEX's aim to address the growing demand for cloud and AI-driven solutions across multiple markets.
- **Edarat.** Edarat Group, a Saudi-based datacenter engineering consulting and cloud services provider in the MENA region, recently introduced colocation services through its newly launched Uptime Tier III facilities in Riyadh and Dammam. These facilities provide secure and scalable environments for hosting critical IT assets, with three availability zones distributed across six datacenters to ensure high availability and business continuity. Designed for energy efficiency, the facilities integrate green energy solutions and advanced cooling systems, achieving a PUE of 1.35. The colocation offering includes carrier-neutral connectivity, redundant power configurations, and multilayered security measures. With these capabilities, Edarat is equipped to

address the region's growing infrastructure demands and is well positioned to become a significant player in the market.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represent the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants and end users. Market weightings are based on user interviews, buyer surveys and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on this IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information and end-user experiences to provide an accurate and consistent assessment of each vendor's characteristics, behavior and capability.

Market Definition

Colocation services are defined as a customer's use of a third party's datacenter facilities (i.e., physical floor/cage/rack space, network capacity, and HVAC/power infrastructure) in which the customer operates its own servers/storage systems, network equipment, and other types of infrastructure. They are segmented as follows:

- **Retail colocation.** This segment includes the rental of rack/cage/cabinet space in the datacenter, network capacity within the datacenter, and access to/use of critical facilities infrastructure such as power and cooling. The customer retains ownership of the equipment housed in the datacenter (typically servers, storage, and networking devices such as firewalls and load balancers) and controls and manages the IT environment. Contracts are typically short to medium term in duration and include a reserved amount of power per rack.
- **Wholesale colocation.** In this segment, the customer leases the building/shell or data hall/suite level rather than the smaller scale of retail colocation (racks/cages/cabinets). Projects generally involve heavily customized builds, although many operators in this segment are moving toward a mix of build-to-suit and turnkey offerings. Customers of wholesale colocation are typically hyperscale content and media/entertainment providers, scale-oriented cloud service providers, and hosting, IT managed services, and telecommunications companies.
- **Interconnection (non-regulated).** Colocation providers facilitate digital exchange points for network providers, internet peering providers, cloud providers, content providers, managed service providers, and enterprises to connect to each other's networks. The modern hyperconnected digital ecosystem relies on low-latency, scalable bandwidth. These carrier-neutral facilities offer direct one-to-one, one-to-many, or many-to-many connectivity as required by each segment. This is an essential aspect of the colocation business and will become increasingly important in the future.
- **Managed and other adjacent value-added services.** Colocation providers also offer a range of managed and other value-added services to enterprises including datacenter customization, smart hands, remote configuration, on-demand compute, and server capabilities, business continuity and disaster recovery as well as monitoring, security, and cabling services.

Strategies and Capabilities Criteria

Table 1 and Table 2 define key strategy and capability processes, respectively, that IDC recommends as integral in successfully selecting a vendor or partner for colocation services.

TABLE 1

Key Strategy Measures for Success: Gulf Countries Colocation Services

Criterion	Definition	Weight (%)
Growth	IDC assesses nonproduct growth strategy for datacenter platform innovation, ecosystem, and GTM innovation.	7.1
Innovation	IDC assesses product-related growth and initiatives related to datacenter operations and infrastructure.	14.3
Functionality or offering strategy	IDC assesses the strategy and delivery of solutions that involve multiple partners.	7.1
Datacenter footprint expansion	The datacenter provider is growing their footprint across existing and new markets. They are also experiencing growth from the size of spend from their customer accounts are becoming larger.	14.3
Differentiated sustainability strategy	Based on the input from all the vendors, the datacenter provider has a differentiated strategy for environmental, social and governance initiatives.	14.3
Go-to-market strategy	IDC assesses the GTM strategy of the datacenter provider and whether they involve strategic partners and/or platforms to help amplify their outreach to the market.	21.4
Delivery	IDC assesses the quality of the edge platform and delivery strategy that the datacenter provider offers to their customers.	14.3
Interconnection strategy	IDC assesses the quality of the interconnection platform.	7.1
Total		100.0

Source: IDC, 2025

TABLE 2

Key Capability Measures for Success: Gulf Countries Colocation Services

Criterion	Definition	Weight (%)
Functionality or offering	IDC assesses the size and scale of the vendor's datacenter footprint in the GCC.	9.1
Portfolio benefits	IDC assesses multiple features such as infrastructure power and performance, location and connectivity, security, reliability, and compliance.	22.7
Go to market, partnerships, and marketplace	IDC assesses the capabilities of the datacenter provider's GTM capabilities, the size and scale of partnerships, and whether they offer a marketplace for their customers and channel partners.	13.6
Innovation capabilities	IDC assesses the capabilities of the datacenter provider's edge services platform. The vendor must offer a variety of edge services, including bare-metal services, network edge, macro edge, and edge cloud.	7.1
	IDC assesses the AI infrastructure hosting readiness of datacenter providers in terms of compute density, power efficiency, and cooling to support AI workloads.	2.0
Interconnection services capabilities	IDC assesses the capabilities of the datacenter provider's interconnection suite.	9.1
Differentiation in sustainability initiatives	IDC assesses the datacenter provider breadth and degree of engagement for its sustainability initiatives.	18.2
Range of services	IDC assesses whether the datacenter provider offers any types of extended datacenter service capabilities (consulting/professional services, software-defined and automated capabilities, service support, and industry-specific solutions).	18.2
Total		100.0

Source: IDC, 2025

LEARN MORE

Related Research

- *GCC Digital Hubs: Transforming Regional Connectivity and Driving Global Integration* (IDC #META52761224, January 2025)

- *Middle East, Türkiye, and Africa Datacenter Operations Survey Results — 2024* (IDC #META51997524, September 2024)
- *center3 Expands Horizons With Strategic CMC Networks Acquisition* (IDC #META52533024, August 2024)
- *The State of Datacenters in Saudi Arabia: An Overview of the Current Landscape and Future Direction* (IDC #META51997524, April 2024)
- *IDC PlanScape: Datacenter Colocation* (IDC #US48727922, July 2023)
- *U.S. Colocation Services Market Shares, 2021: Private Equity and Asset Management Firms Drive M&A of Midtier Colocation Segment* (IDC #US49249521, June 2022)

Synopsis

The IDC MarketScape evaluates colocation service providers in the Gulf Region, highlighting the growing preference for third-party datacenters due to their innovation, security, connectivity, and sustainability. It assesses center3, du, e& enterprise, Emircom, Equinix, Mobily, Moro Hub, and NourNet, detailing their strengths, challenges, and suitability for various business needs. This IDC MarketScape also emphasizes the strategic importance of choosing the right datacenter provider to support digital transformation and operational efficiency.

"Third-party datacenters are more than just physical infrastructure; they serve as strategic enablers of digital transformation. By providing cutting-edge innovation, seamless connectivity, robust security, and sustainable operations, they empower businesses to scale efficiently, adapt to evolving demands, and stay ahead in an increasingly competitive landscape," said Shahin Hashim, associate research director, Enterprise Infrastructure.

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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